

AMHERST COLLEGE

P L A N N E D G I F T S F O R A M H E R S T

CLASS OF
1961

50th Reunion Gift Chairs

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For more information,
please visit www.amherst.edu/give/gift_planning,
or contact Tom Ehrgood,
Director of 50th Reunion
Giving, by telephone at
413-542-7907 or by email
[at taehrgood@amherst.edu](mailto:taehrgood@amherst.edu). If you establish any
estate provision benefiting
Amherst, please let us
know so that we can
welcome you as a Johnson
Chapel Associate.

The 50th Reunion and Johnson Chapel Associates

Johnson Chapel Associates are alumni and friends who have included Amherst College in their estate plans, either by making life-income gifts (charitable trusts or gift annuities) or by making revocable designations to Amherst as described below. Life-income gifts return income for life to the donor and a beneficiary, with the remainder to the College. Revocable gifts benefit Amherst upon a donor's death. Each year, these revocable gifts provide approximately \$3 million in bequests or beneficiary disbursements to support the work of the College.

By making Amherst part of your estate plan, you can provide a gift to the College as a lasting legacy of your support and as a part of your Reunion contribution. Some estate provisions can be completed in less than five minutes, often with a few simple keystrokes.

1) Donate assets in return for life income. Charitable remainder trusts and charitable gift annuities provide secure lifetime income with annual payouts of 5% or more, with the remaining value coming to Amherst upon termination.

2) Name Amherst in your will or living trust. The traditional revocable gift is a testamentary bequest or a provision naming Amherst in your living trust. In either, you can leave the College a portion of your estate, either a specific dollar amount or a percentage distribution. When you write a new will or living trust with your attorney or amend an existing document, consider including Amherst as a designated charity. For an unrestricted bequest, you can reference "the Trustees of Amherst College, in Amherst, Massachusetts, to be used for the general purposes of the College."

3) Make Amherst a partial beneficiary of your retirement account (IRA, 401(k), 403(b), etc.). Beneficiary designations are a great way to provide for Amherst from your estate quickly and easily, without the need for an attorney. You can file a simple form with your plan administrator, or change your beneficiary allocation in minutes online at no cost to you.

4) Make Amherst a partial beneficiary of your life insurance policy or donor-advised fund. The procedure for making these revocable gifts is similar to making Amherst a beneficiary of a retirement account.

Because of the importance of bequests and other estate gifts for the long-term financial health of the College, an essential goal of the *Lives of Consequence* campaign is to secure at least 500 new Johnson Chapel Associates. The Class of 1961's goal this 50th Reunion year is to double the number of current JCA members to 30.